

Atty Perkins, Jan T. (for Stephen Ronald Cloud, Brother / Conservator)

Atty Sanoian, Joanne (for Stephen Cloud, Jr., Estate Beneficiary)

(1) Amended Verified Sixth and Final Account and (2) Report of Conservator of the Person and Estate of Conservatee and (3) Petition for Discharge of Conservator on Final Account

(Prob. C. 2620)

DOD: 4-19-04		STEPHEN RONALD CLOUD , brother and Conservator of the Person and Estate, is Petitioner. Mr. Cloud was originally appointed on 5-14-92 as a Co-Conservator with his father. After his father's death, he continued as sole Successor Conservator. The Fifth Account was settled 12-18-02. Amended Sixth Account period: 6-30-02 through 6-29-11 Accounting: \$7,061,538.36 Beginning POH: \$2,578,039.04 Ending POH: \$6,723,119.54 (\$1,961,471.54 is cash) (6,723,119.54 less \$1,497,115.20 in liabilities = \$5,226,004.34) Conservator: Waives fee Petitioner prays for an order: 1. Approving, allowing, and settling the Sixth and Final Account; 2. Authorizing distribution to the estate of the remaining property in Conservator's possession; and 3. Discharge on the filing of proper receipts SEE PAGE 2 (re additional declarations)	NEEDS/PROBLEMS/COMMENTS: Note: Page 3 of this calendar is the related estate file (status for closure). The estate is dependent on this conservatorship account and distribution to the personal representative. Background: The court previously requested clarification regarding certain unauthorized distributions and liabilities described in the accounting. The conservator had distributed funds as CDs came due directly to certain trusts that are beneficiaries of the decedent's estate. Attorney Perkins' declaration filed 5-25-11 suggested that the appropriate resolution would be reversal of the distribution with interest, and that surcharge is not necessary. <u>Attorney Perkins' declaration filed 6-30-11 reflects that the unauthorized distributions have been repaid to the conservatorship estate with interest.</u> Conservator's declaration filed 5-2-11 explains the liabilities: In order to pay estate taxes owed by the decedent's estate, the conservatorship estate borrowed \$516,849.00 from a separate trust (the Jasmine Cloud Administrative Trust). Therefore, there is a note payable to the Jasmine Cloud Administrative Trust. Conservator also states that he advanced \$980,406.20 to the conservatorship estate from his personal funds to fund the expenses of the conservatorship estate while the conservatee was alive, and for expenses associated with her death. <u>Examiner notes that there is no documentation provided as to these notes or expenses paid.</u> The description of the note to the conservator in the original account Schedule G states that the note "included \$35,878 for funeral expenses, \$205,000.00 for administration expense, \$39,727 for appraisals, and \$5,431 for taxes." <u>However, no documentation (itemization or receipts) is provided.</u> SEE PAGE 2, 3
Cont. from 030811, 050311, 053111, 071211			
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Citation			
FTB Notice			

Updates:
Contacts: emailed, faxed attys 9-9-11
Recommendation:
Reviewed by: skc
File 1 - Cloud

Atty Perkins, Jan T. (for Stephen Ronald Cloud, Brother / Conservator)

Atty Sanoian, Joanne (appeared at hearing on 7-12-11)

(1) Amended Verified Sixth and Final Account and (2) Report of Conservator of the Person and Estate of Conservatee and (3) Petition for Discharge of Conservator on Final Account

(Prob. C. 2620)

Declarations filed 5-2-11, 5-25-11, 6-30-11 address prior examiner notes:

- Regarding distribution to trusts: Petitioner states the sole beneficiaries of the probate estate are two testamentary trusts for the benefit of Ryan John Cloud and Stephen Ronald Cloud, Jr. After Conservatee died, CDs belonging to the conservatorship estate began coming due, and the Conservator transferred the cash to the trusts. Attorney Perkins' declaration filed 6-30-11 reflects that the unauthorized distributions have been repaid to the conservatorship estate with interest.
- Regarding liabilities: Petitioner states that money was loaned to the Conservatee's estate in order to fund the expenses of the estate while Conservatee was alive and pay those expenses associated with her death. Petitioner states it was his practice to fund all cash needs of the conservatorship estate with his own money. Liabilities include a note payable to a separate trust for \$516,849.00 for estate taxes and a note to Petitioner for \$980,406.20.
- Regarding Probate Code §2620(c): Petitioner states that because so much time has passed since closing of the accounts that records are not available.
- Attorney Perkins recommended reversal of the unauthorized distributions without surcharge, and provided revised schedules reflecting the reversal with interest.

Attorney Joanne Sanoian appeared at the hearing on 7-12-11 for Stephen Cloud, Jr., an Estate Beneficiary.

Minute Order 7-12-11: Ms. Sanoian advises the Court that her client has not received any notice regarding this matter. She further advises that she is going to want to do some kind of forensic accounting. Ms. Sanoian requests a continuance. Matter continued to 9-13-11.

As of 9-9-11, nothing further has been filed.

The following issues may require further attention before the account is settled: See Page 3.

Atty Perkins, Jan T. (for Stephen Ronald Cloud, Brother / Conservator)**Atty Sanoian, Joanne (appeared at hearing on 7-12-11)****(1) Amended Verified Sixth and Final Account and (2) Report of Conservator of the Person and Estate of Conservatee and (3) Petition for Discharge of Conservator on Final Account****(Prob. C. 2620)**

- 1. The main issues with the accounting as previously presented were: 1) the unauthorized distributions, and 2) the liabilities.** It appears the unauthorized distributions have been addressed and reversed; however, the court may require further clarification regarding the liabilities.

Conservator's 5-2-11 declaration provides a brief explanation of the note payable to another trust and the note payable to the conservator for personal funds advanced. The examples included in the description of the note payable to the conservator (funeral expenses, administration expenses, etc.) total \$286,036. The declaration does not explain what the remaining \$694,370.20 was used for, and further, the loan amounts do not appear to be reflected in the receipts schedules, there is no other documentation (receipts for goods and/or services) or itemization, and copies of the notes are not provided.

The original prayer requests distribution of all remaining property to the decedent's estate, but does not specifically include these liabilities. The revised schedules filed 6-30-11 appear to reduce the property on hand by the amount of the liabilities.

If it is Petitioner's intent for the notes to be paid prior to distribution to the decedent's estate, further clarification may be required at this time.

If it is Petitioner's intent for the notes payable to become obligations of the decedent's estate, the court may specifically reserve this issue to be addressed further in that case.

- 2. The declaration amending the account period and schedules to reflect actions subsequent to the prior account period is not verified by the fiduciary (Probate Code §1023).**
- 3. Need order.** *Petitioner may wish to submit the order for signature after the hearing.*
- 4. It appears notice has not been provided to all relatives within the 2nd degree pursuant to Probate Code §§ 2621, 1460(b)(6), 1821(b), Cal. Rule of Court 7.51.** **Need notice of hearing and appropriate notice.**
- *Examiner notes that the list of relatives provided in the 1992 petition for conservatorship may be outdated. An updated list and notice is required.*
 - *Examiner notes that the Notice of Hearing filed 2-8-11 (for the 3-8-11 hearing) reflects that notice to the two Estate Beneficiaries (Stephen Cloud, Jr., and Ryan Cloud) was sent "c/o Jeffrey G. Boswell, Esq., Kimble, MacMichael & Upton" but was not sent directly to the beneficiaries.*

Note: Minute Order 5-31-11 states "Ms. Wright is appearing on behalf of Ms. Cloud." Examiner is unsure if this refers to Ms. Cloud the decedent (former conservatee?) or another related party.

Note: Examiner notes that when the 5th account was settled in 2002, the language ratifying acts and transactions of the conservator was stricken by the judge. The court may require similar revision to this order.

Atty Hjerpe, Thomas B (of Eureka, CA, for Sharilyn L. Whitaker – Conservator)

Probate Status Hearing Re: Termination of Proceeding for Deceased Conservatee
(Prob. C. § 1860, et seq.)

DOD: 3/7/04	SHARILYN L. WHITAKER , daughter-in-law, is Conservator. She was appointed as Conservator by this Court on 8/26/96. <i>Status Report</i> , filed 7/11/11 by Conservator, states: <ol style="list-style-type: none"> 1. The Conservatee had limited assets; 2. The Conservator liquidated the assets to pay Conservatee's expenses, under the Court's supervision; 3. Annual accountings were filed and approved and per Court order of 9/14/99, were waived; 4. Conservatee died on March 7, 2004; 5. There are two outstanding claims totaling \$250.00, and there are no other claims; 6. The Conservator will resolve these claims prior to submitting a final accounting; 7. A Notice to Court of Death of Conservatee was served on the parties on 7/7/11, and has been filed with the Court. 	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Final Account and Report of Conservator was filed and is set for hearing on 10/13/11.
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Citation		
FTB Notice		
Updates: Contacts: faxed atty 9/6/11 Recommendation: Reviewed by: NRN/KT File 2 - Whitaker		

Atty Perkins, Jan T. (for Conservator Stephen Ronald Cloud)
 Atty Sanoian, Joanne (for Stephen Cloud, Jr., Beneficiary)

Filing of First Account or Petition for Final Distribution and Filing of Inventory and Appraisal

DOD: 04/19/04		<p>STEPHEN RONALD CLOUD was appointed Executor with full IAEA without bond on 8-29-06 and Letters Issued 8-30-06.</p> <p>Inventory and appraisal was due 12-29-06.</p> <p>First account or petition for final distribution was due 8-30-07.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Page 1 of this calendar is the related conservatorship final account. This estate is dependent on the conservatorship account and distribution to the personal representative.</p> <p>Stephen Ronald Cloud is also Conservator of the Estate of Rhonda Jane Cloud in Case # 458379.</p> <p>1. Need Inventory and Appraisal and Petition for distribution.</p> <p><u>Notes:</u> <i>Minute Order 11-16-10</i> states attorney Rindlisbacher represents to the court that they are awaiting bank records that were requested several weeks ago with regard to the conservatorship accounting. <u>The court advises that this will be the last continuance with the possibility of sanctions absent extraordinary good cause.</u></p> <p>Status report filed 4-9-10 indicated Executor was awaiting distribution from conservatorship estate; however, <u>Examiner notes that the I&A for the probate estate should include assets as of date of death, and may not be contingent on distribution from the conservatorship estate.</u></p> <p>Documents filed in the Conservatorship Estate (0458379) indicate that Mr. Cloud made <u>unauthorized preliminary distributions</u> after the date of death <u>totaling \$1,779,985.14</u> directly from the conservatorship accounts to the probate estate beneficiaries' trust accounts, of which he is the trustee.</p> <p><u>Probate Referee Steven Diebert has filed a Request for Special Notice in this Estate case.</u></p>
Cont. from 042810, 061510, 092110, 111610, 012511, 030811, 050311, 071211			
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Sp.Ntc.		<p>Status Report of Stephen Ronald Cloud regarding the Inventory and Appraisal filed 4-19-10 states he is also the conservator of the estate of Rhonda Jane Cloud, case no. 0458379. As of the date of the status report the Conservator has not provided Attorney Rindlisbacher with the accounting required nor has the Conservator delivered the Conservatee's estate to Executor. When a final accounting has been prepared and approved by the Court in the Conservatorship, Executor will be in a position to administer the estate of the Decedent.</p> <p>Probate Referee Steven Diebert filed a Request for Special Notice on 8-31-11.</p>	
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Aff. Posting		<p>Updates:</p> <p>Contacts: e-mailed, faxed attys 9-9-11</p> <p>Recommendation:</p> <p>Reviewed by: KT/JF/SKC/JF/skc</p> <p>File 3 - Cloud</p>	
Status Rpt			
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Citation			
FTB Notice			

4A

DOD: 08/26/09		<p>JIM NAILEN, was appointed Executor and Letters were issued on 03/24/10.</p> <p>Petitioner filed his Petition for Final Distribution on Waiver of Accounting on 03/23/11 and was originally set for hearing on 05/31/11 and subsequently continued to 08/02/11.</p> <p>Per Minute Order dated 08/02/11 the the Court orders the amounts designated to minors be placed in blocked accounts.</p> <p>Orders to Deposit Money into Blocked Account were signed by the Court on 09/07/11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
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Citation			
FTB Notice			
		Updates:	
		Contacts: copy of notes in file	
		Recommendation:	
		Reviewed by: JF	
		File 4B - Taylor	

Atty Chester, Bruce C., sole practitioner (for Petitioner Clyde Prickett, Executor)

(1) Waiver of Accounting and (2) Petition for Allowance of Compensation to Attorney, (3) For Appointment of Trustee, (4) and for Final Distribution (Probate Code 10954, 11640)

DOD: 4/14/2009		<p>CLYDE PRICKETT, spouse and Executor, is Petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$1,880,056.00 POH - \$1,880,056.00 <i>(\$501,913.00 is cash)</i></p> <p>Executor - waives</p> <p>Attorney (statutory) - \$31,800.56</p> <p>Petitioner requests the Court appoint CLYDE PRICKETT as Trustee of the JUNE PRICKETT RESIDUARY TRUST created under Decedent's Will, pursuant to Article FIFTH of the Will naming him as Trustee.</p> <p>Distribution pursuant to Decedent's Will is to:</p> <ul style="list-style-type: none"> CLYDE PRICKETT – Decedent's ½ interest in household furniture, furnishings, and personal belongings; CLYDE PRICKETT as Trustee of the JUNE PRICKETT RESIDUARY TRUST – Decedent's ½ interest in entire estate consisting of real property, shares of stock, and \$470,112.44 cash. 	NEEDS/PROBLEMS/COMMENTS:
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Reviewed by: LEG
Reviewed: 9/2/11; faxed attorney 9/2/11
Updates: 9/9/11; faxed attorney 9/9/11
Recommendation: SUBMITTED
File 5 - Prickett

(1) First and Final Report of Administrator and Petition for Its Settlement on Waiver of Account, (2) for Waiver of Administrator's Fees, (3) for Allowance of Statutory Fees to Attorney for Ordinary Services and (4) for Final Distribution (Independent Administration of Estates Act)

DOD: 2/10/10		MARLENE L. LUCID,	NEEDS/PROBLEMS/COMMENTS:
		Administrator, is petitioner.	
		Accounting is waived.	
Cont. from			
	Aff.Sub.Wit.	I & A - \$67,206.64	
✓	Verified	POH - \$78,861.55	
✓	Inventory		
	PTC	Administrator - waives	
✓	Not.Cred.	Attorney - \$2,688.27	
✓	Notice of Hrg	(statutory)	
✓	Aff.Mail	Costs - \$1,201.50	
	Aff.Pub.	(filing fees, publication, certified copies)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Closing - \$300.00	
✓	Letters	4/14/10	
	Duties/Supp	Distribution, pursuant to intestate succession, is to:	
	Objections		
	Video Receipt	Beverly A. Moore - \$24,890.60	
	CI Report	Richard A. Marini, Jr.- \$24,890.60	
✓	9202	Marlene M. Lucid - \$24,890.60	
✓	Order		
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	UCCJEA		
	Citation		
✓	FTB Notice		
			Updates:
			Contacts: faxed atty 9/6/11
			Recommendation: SUBMITTED
			Reviewed by: KT
			File 6 - Marini

Petition for Modification of Order and for Confirmation of Acts of Guardian (Prob. C. 2359)

Age: 12 years DOB: 8/22/99		BETH DEBUSSEY aka CAROLYN ELIZABETH DEBUSSEY , paternal grandmother, is Petitioner. Father: PATRICK DEBUSSEY - <i>Deceased</i> Mother: JENNIFER FENTON Petitioner states she was appointed as guardian on 2/15/11. The court ordered visitation between the minor and his mother, Jennifer Fenton subject to the following conditions: <ol style="list-style-type: none">1. There shall be no overnight visits;2. The minor is not to be taken outside the city of Fresno;3. If the minor is transported in a vehicle, the driver shall be properly licensed and insured, and the minor shall wear appropriate safety restraints while in the vehicle;4. No alcohol, drugs or controlled substances are to be used by anyone in the minor's presence, nor shall anyone in the minor's presence be under the influence of alcohol, drugs or controlled substances. Petitioner states since the order issued, Petitioner has encountered several difficulties with the mother which, if they do not technically violate the Court's Order, certainly are contrary to the spirit of the Court's Order. The difficulties include: <ol style="list-style-type: none">1. The minor was suspended from school because he was in possession of drug paraphernalia, specifically a drug pipe. Petitioner alleges the minor obtained the drug pipe during a visit with his mother.2. The minor was given a cell phone by his mother. It was discovered that the phone had lewd photos of mom and her husband, as well as other inappropriate images.3. Petitioner fears that mom will encourage the minor to run away from home.4. Petitioner believes the minor's mother has acted, and continues to act, willingly and knowingly, in ways which seek to undermine Petitioner's relationship with the minor and her authority as guardian. Petitioner prays <ol style="list-style-type: none">1. For a modification of the Court's Order of 2/15/2011, so as to require that all visitation between the minor and his mother be supervised;2. Confirmation of the acts of guardian restricting visitation between the minor and his mother until such time as the Court rules on the request for modification of the Court's Order.	NEEDS/PROBLEMS/ COMMENTS:	
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File 7 - DeBussey				

			<p>RONALD A. MINASIAN, JR., Trustee, is petitioner.</p> <p>Petitioner states on 4/14/09, Marylin Minasian, as settlor, executed the Marylin Minasian 2009 Revocable Trust.</p> <p>Marylin Minasian died on 4/18/09.</p> <p>Petitioner states this petition is brought to request that the court instruct petitioner, as trustee of the Trust, that he may sell the real property to himself in his individual capacity.</p> <p>Petitioner states on 2/28/11, he filed a Petition to Instruct Trustee as to Distribution of Residue of Trust Estate. All property of the Trust has been distributed except those which are to be distributed as part of the residue of the Trust estate. Among the assets that are part of the residue of the Trust estate is approximately 19.75 acres of agricultural land which also contained the Trustor's residence.</p> <p>Pursuant to the terms of the Trust, the residual Trust estate is to be distributed to Ronald Minasian (Petitioner) and his sister, Deborah Minasian-Row. Deborah Minasian-Row died intestate on 4/1/10. She was and continues to be survived by her husband, Michael Row, by no issue and by neither of her parents. She died in the State of Maryland. Petitioner has received no notice of, or has no knowledge of, any proceedings being opened to administer the estate of Deborah Minasian-Row (although petitioner has received notice that Michael Row has begun to attempt to do so).</p> <p>On 4/20/11 in response to Petitioner's original Petition to Instruct Trustee, this Court entered its Order Instructing Trustee to Distribute the Residue of the Trust Estate as follows:</p> <p style="text-align: center;"><i>Please see additional page</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
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Updates:

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Recommendation:

Reviewed by: KT

File 8 - Minasian

- a. To distribute ½ of the residue of the Trust estate available for distribution, free of trust, to such person or persons and/or entity or entities, and in such further proportions, as are duly determined, under the laws of the State of Maryland or other appropriate jurisdiction, to be the person or persons and/or entity or entities entitled to the estate of Marylin Minasian's deceased daughter, Deborah Minasian-Row; and
- b. To distribute the remaining ½ of the Trust estate available for distribution, free of trust, to Ronald A. Minasian, Jr.

Petitioner states Article Eight, Paragraph M, of the Trust gives the Trustee of the Trust in the Trustee's sole and absolute discretion, the express power to purchase Trust assets at their fair market value as determined by an independent appraisal.

Prior to filing the original Petition to Instruct Trustee, Petitioner obtained an appraisal of the property from Wayne A. Carstens, and licensed appraiser. Mr. Carstens' original appraisal of the real property as of 12/24/10 at \$247,000. However, in discussion with Mr. Carstens after the hearing on the original Petitioner to Instruct Trustee, it was learned that Mr. Carstens had reasonably understood that he was to appraise the real property as farm land, without regard to the residence on the real property. On June 1, 2011 Mr. Carstens modified his appraisal to include the real property and found the fair market value of the property to be \$292,000. More recently, Mr. Carstens submitted an update to his appraisal which appraised the real property at \$302,000.

Petitioner states at the time of Marylin Minasian's death, she owned the real property and other assets outside of the Trust. A probate was commenced and during the administration of the estate Rick Smith was appointed as the Probate Referee. As part of the inventory and appraisal filed in the probate proceedings, Rick Smith assigned a fair market value of the property as of the date of death of Marylin Minasian on 4/18/2009 at \$1,500,000. Due to the huge difference between the value of Mr. Carstens' appraisal and Rick Smith's appraisal Petitioner contacted Mr. Smith to issue a new report on the real property's value. Mr. Smith's revised report values the real property at \$350,000.

Petitioner proposes to purchase the real property for \$326,000. This purchase price is the midway point between the value assigned by Mr. Carstens and the value assigned by Mr. Smith.

Petitioner proposes reduce the purchase price by monies owed to him from the trust estate as follows:

- a. Payments due to him under a Secured Promissory Note of \$109,835.31.

Petitioner states that shortly after Marylin Minasian's death she owned a combined federal and state tax liability of \$95,185.00. The trust contained little or no cash so there was no ability to pay this liability. Therefore, on 6/10/10, Petitioner loaned the trust the sum of \$98,598.00, which was then the combined amount of the estates federal and state tax liability, including interest and penalties.

Please see additional page

8 (additional page) In the Matter of the Marylin Minasian Trust

Case No. 11CEPR00152

The loan is evidenced by a Promissory Note which, in turn was secured by a Deed of Trust on the Real property. The promissory note provides for a simple interest rate of 10% per year on unpaid principal until paid in full. The Promissory Note also provides that it shall be repaid upon the sale of the real property.

No portion of the principal or interest on the Promissory Note has been paid and there will be an accrued but unpaid interest on the Promissory Note as of July 31, 2011, in the amount of \$11,237.31, and at \$27.01 per day until the consummation of the sale to Petitioner.

- b. Advances made on behalf of the Trust at \$64,964.56. Petitioner states he is entitled to reimbursement from the Trust.
- c. Trustee's Fees at \$54,000.00. Petitioner states Article Twelve, Paragraph C, of the Trust provides that the Trustee may pay himself a reasonable compensation from time to time without prior court order.

The total amount due to petitioner from the trust for the above items is \$228,799.87.

- d. Petitioner ½ interest in the net value of the real property is \$48,600.06. Petitioner proposed to apply this interest to the purchase price.
- e. To the extent that the above amounts are not sufficient to pay the full amount of the purchase price, Petitioner intends to pay the Trust cash in an amount sufficient to pay the remainder of the purchase price.

Petitioner prays for an order instructing the Trustee that the Trustee may sell the real property of the Trust to himself, in his individual capacity, on the following terms:

1. The purchase price of the real property shall be \$326,000.00;
2. The Trustee may apply to the purchase price the amount of principal and interest due him on his loan to the Trust \$109,835.31 as of 7/31/11, and an additional 27.01 for each day after 7/31/11, until the consummation of the sale.
3. The Trustee may apply to the purchase price his advances on behalf of the Trust in the amount of \$64,383.77;
4. The Trustee may apply to the purchase price his fee in the amount of \$54,000;
5. The Trustee may apply to the purchase price his ½ beneficial interest in the real property
6. The Trustee shall pay the remainder of the purchase price in cash at the close of escrow.

			NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Amended Account filed and set for hearing on 10/13/11
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			Updates:
			Contacts:
			Recommendation:
			Reviewed by: KT
			File 9 - Garbutt

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 07/16/11		STEPHANIE SCARBRIEL , daughter/named Executor without bond, is Petitioner. Full IAEA – OK Will dated 09/20/07 Residence: Fresno Publication: The Business Journal <u>Estimated Value of the Estate:</u> Personal property - \$ 5,000.00 Real property - 85,000.00 Total - \$90,000.00 Probate Referee: RICK SMITH	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/o
✓	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Updates: Contacts: faxed atty 09/06/11 Recommendation: SUBMITTED Reviewed by: JF File 10 - Mora	

Atty Bagdasarian, Gary G., sole practitioner (for Petitioner Ronald J. Bryant, son)
 Atty Wright, Janet, of Wright & Johnson (Court-appointed for Conservatee)

**Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
 1820, 1821, 2680-2682)**

Age: 91 years		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 8/25/2011. Voting Rights Affected – Need Minute Order. Note: Petitioner resides in Boulder Creek, CA. 1. Petitioner requests bond be fixed in the amount of \$10,000.00; however, the required bond amount calculates as \$11,246.40 based upon the requirements of Probate Code § 2320(c) and CA Rule of Court 7.207(b). 2. Need Video Viewing Certificate pursuant to Local Rule 7.15.9(A).
DOB: 10/12/1919			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	RONALD J. BRYANT , son, is Petitioner and requests appointment as Conservator of the PERSON, with medical consent and dementia powers to administer dementia medications, and for placement in a secured-perimeter facility, and for appointment as Conservator of the ESTATE with bond set at \$10,000.00 . <u>Estimated value of the Estate:</u> Personal property - \$1,500.00 Annual income (benefits) - \$8,724.00 <u>Real property - \$37,500.00</u> Total - \$47,724.00 Capacity Declaration of Jeffrey Mar, Ph.D., was filed on 9/8/2011. Voting Rights Affected. Petitioner states the proposed Conservatee is 91 years of age, resides at Golden Living Center in Clovis, and is unable to live alone as she suffered a stroke and is confined to a wheelchair and needs assistance with feeding and other necessities of life. Petitioner states the proposed Conservatee is unable to manage her financial resources as she suffers from dementia and is not able to pay her bills or resist fraud or undue influence. Court Investigator Jennifer Young's Report was filed on 9/6/2011.	
<input checked="" type="checkbox"/>	Aff.Mail		W/
<input type="checkbox"/>	Aff.Pub.		
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<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		X
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: LEG

Reviewed: 9/7/11

Updates: 9/9/11

Recommendation:

File 11 – Bryant

Probate Status Hearing Re: Failure to File Bond for Successor Trustee in the Amount of 2 Million Dollars

		<p>DAVID S. COLBURN was appointed Successor Trustee on 6-27-05 with bond of \$210,000.00 because he was not authorized to sell the real property of the trust without court confirmation.</p> <p>However, Mr. Colburn did sell the real property and the trust received net proceeds of \$2,258,513.39.</p> <p>On 1-12-11, Mr. Colburn resigned and Norman Brown was appointed Successor Trustee effective upon posting bond of \$2,000,000.00.</p> <p>Mr. Colburn previously filed a petition requesting to waive bond entirely for the Successor Trustee, which hearing set for 4-11-11; however, on 4-8-11, Mr. Colburn requested to dismiss that petition and the hearing was taken off calendar.</p> <p>This Status hearing was then set for 4-26-11 for failure to file bond, and has been continued to 7-26-11 and 9-13-11.</p> <p>Trustee's Report filed 4-22-11 stated circumstances have changed. If Mr. Brown had become trustee before April 5 (the end of the UK tax year), taxes would have been minimal; however, at this time, the appointment of Mr. Brown would trigger "disastrous" tax consequences for the trust, including liability for capital gains taxes on all sales during the past five to seven years. <u>Petitioner stated that the beneficiaries have all asked in the strongest terms that efforts to install Mr. Brown as successor trustee be stopped and that his appointment be reversed.</u> Petitioner stated that the beneficiaries had been emailed a copy of the status report and requested that the court dispense with notice.</p> <p>On 4-26-11, the court ratified David Colburn as Trustee and ordered the balance of any funds not yet vested placed into a blocked account.</p> <p>On 7-26-11, counsel advised the court that the blocked account will be in the sum of \$2,000,000.00 and the continued bond will be in the amount of \$210,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> All parties (the court-appointed successor trustee, the income beneficiary, and all three remainder beneficiaries) reside in the UK.</p> <p><u>Minute Order 4-26-11:</u> The court ratifies David Colburn as trustee. In lieu of increased bond the balance of any funds not yet vested shall be placed into a blocked account. The court is made aware that waivers of bond for all beneficiaries are on file. Matter continued to 7-26-11.</p> <p><u>Minute Order 7-26-11:</u> Counsel advises the Court that the blocked account will be in the sum of \$2,000,000.00 and the continued bond will be in the amount of \$210,000.00.</p> <ol style="list-style-type: none"> <u>Need proof of blocked account at Morgan Stanley.</u> <u>The court may require clarification regarding the Trustee's sale of the real property without court order, and, if not dispensed, notice to all beneficiaries.</u> <p><i>(Petitioner's report filed 4-22-11 stated that all beneficiaries had been emailed a copy of the status report and requested that the court dispense with further notice.)</i></p>
Cont. from 042611, 072611			
Aff.Sub.Wit.			
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Notice of Hrg	X		
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Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
✓ Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			

Updates:
Contacts: emailed notes 9-9-11
Recommendation:
Reviewed by: skc
File 12 - Pomeroy

Probate Status Hearing Re: Proof of Establishment of Conservatorship in Massachusetts

Age: 67 years DOB: 12-18-43		<p>WILLIAM DURANT, JR., was appointed Probate Conservator of the Person and Estate on 12/2/08 with medical consent powers and bond fixed at \$51,522.55, as well as certain other specific powers. Bond was filed and Letters issued.</p> <p>Minute Order 6/22/10 (Hearing on Petition to Fix Residence Outside the State of California): Order signed as amended on the record. If proof of the conservatorship being established in MA and the final account/petition to terminate are filed by 9/20/10, then no appearance is necessary on 9/21/10.</p> <p>A Pre-Move Notice of Proposed Change of Personal Residence of Conservatee was filed 7/7/10 and a Post-Move Notice of Change of Residence of Conservatee was filed 8/3/10.</p> <p>Minute Order dated 08/02/11 continued the matter to 09/13/11. Counsel advised the Court that the Court in Massachusetts is in the process of being set up and is a dual procedure.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 08/02/11</u></p> <p>As of 09/09/11, the following remains outstanding:</p> <p>1. Need proof of conservatorship being established in Massachusetts. <i>Declaration of Attorney Joseph A. Cleary filed on 09/08/11 states that William D. Durant, Jr. was appointed as Permanent Guardian of George Banigan on 04/22/11 and Letters of Guardianship for an incapacitated person were issued, and Certification was issued on 04/28/11. The companion probate proceeding for the Appointment of Mr. Durant as Permanent Conservator of Mr. Banigan is not complete. The matter was heard for allowance on 08/12/11. The Middlesex Probate Court allowed the appointment of William D. Durant, Jr. as Permanent Conservator subject to filing of a fiduciary bond with personal sureties on or before September 12, 2011. The bond has not yet been filed, but will be filed before September 12, 2011.</i></p>
Cont. from 011111, 031511, 051711, 080211			
Aff.Sub.Wit.			
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Duties/Supp			
Objections			
Video Receipt			
CI Report			
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Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Updates: faxed atty 09/09/11</p> <p>Contacts: faxed atty 09/02/11</p> <p>Recommendation:</p> <p>Reviewed by: JF</p> <p>File 13A - Banigan</p>	

13A

Age: 67 years	
DOB: 12-18-43	
Cont. from 011111, 031511, 051711, 080211	
Aff.Sub.Wit.	
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Duties/Supp	
Objections	
Video Receipt	
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Order	
Aff. Posting	
Status Rpt	
UCCJEA	
Citation	
FTB Notice	

WILLIAM DURANT, JR., was appointed Probate Conservator of the Person and Estate on 12/2/08 with medical consent powers and bond fixed at \$51,522.55, as well as certain other specific powers. Bond was filed and Letters issued.

Minute Order 6/22/10 (Hearing on Petition to Fix Residence Outside the State of California): Order signed as amended on the record. If proof of the conservatorship being established in MA and the final account/petition to terminate are filed by 9/20/10, then no appearance is necessary on 9/21/10.

A Pre-Move Notice of Proposed Change of Personal Residence of Conservatee was filed 7/7/10 and a Post-Move Notice of Change of Residence of Conservatee was filed 8/3/10.

Minute Order dated 08/02/11 continued the matter to 09/13/11.

NEEDS/PROBLEMS/COMMENTS:**CONTINUED FROM 08/02/11**

As of 09/02/11 no further documents have been filed and the following issue remains:

1. Need final account / petition to terminate conservatorship.

Updates:

Contacts: faxed atty 09/02/11

Recommendation:

Reviewed by: JF

File 13B - Banigan

Probate Status Hearing Re: Status Report or Filing of Petition for Final Distribution

DOD: 01/29/08		<p>SHERI VAUGHT was appointed Administrator on 4/6/2009 with full IAEA without bond and Letters issued.</p> <p>Background: Decedent's personal residence, upon which he took out a reverse mortgage, is the only significant asset of the estate. On 12/24/08, the Lender recorded a Notice of Default relating to the subject loan, and upon the death of the Decedent, called the entire balance on the Note due and payable. Petitioner requested the court issue an order restraining the Lender from proceeding with the foreclosure sale.</p> <p><i>Order Enjoining Pending Foreclosure Sale</i> was signed on 7/14/09 and set review for 1/12/10. <i>Order to Enjoin Pending Foreclosure Sale</i> signed 4/19/10 extends injunction to 10/19/10 to allow time to find another buyer for the home.</p> <p><i>Minute Order</i> dated 10/19/10 from status hearing on the order to enjoin pending foreclosure states there are no appearances in this matter. The Court issues an Order to Show Cause to Sheri Vaught as to why she should not be removed as Administrator of the Estate and orders Ms. Vaught and Attorney Daniel Bruce to be personally present in Court on 11/2/10. The Court is not extending the injunction as a result of non-appearances.</p> <p><i>Minute Order</i> dated 11/2/10 states attorney Bruce represents to the court that the lender has agreed to not foreclose on the property. The court vacates the Order to Show Cause. An appearance is required on 1/11/11 and Mr. Bruce is to either file a Status Report or a Petition for Final Distribution.</p> <p>Declaration of Attorney Daniel Bruce filed 01/10/11, states that Ms. Vaughn entered into a purchase agreement to sell the real property of the estate on 08/19/10. An escrow was opened and is still pending.</p> <p>Minute order from 3/8/11 stated counsel advises the Court that the sale was completed a week ago.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 8/2/2011.</p> <p>1. Need current status report or Petition for Final Distribution.</p>
Cont. from 011111, 030811, 050311, 061411, 080211			
Aff.Sub.Wit.			
Verified			
Inventory			
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Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Updates:
Contacts: faxed atty 9/6/11
Recommendation:
Reviewed by: KT
File 14 - Vaught

Petition for Visitation

Age: 4 years		<p>HEATHER SINGER-JONES, mother, is Petitioner.</p> <p>GARRISON JONES SR., paternal grandfather, is the minor's guardian. Mr. Jones was granted guardianship on 9/3/09.</p> <p><u>Petition for Visitation</u>, filed 7/15/11, states: Petitioner has not seen the minor for 3 months. Petitioner has called the guardian Mr. Jones about the visits, but has not heard back from him. She would like the Court to grant her more visitation with the minor, and she feels worried and scared that she does not know how the minor is doing or if he is hurt. Petitioner is very frustrated with Mr. Jones because he has not returned her calls. Petitioner called the Clovis Police and explained the situation, and they called Mr. Jones, who did not call the police back. Mr. Jones has violated the court order that Petitioner is allowed to see the minor Timothy every other Saturday from 10 a.m. to 2 p.m., as Mr. Jones has not followed the court order.</p> <p><u>Current Guardian Garrison Jones Sr.'s Objection to Petition for Visitation</u>, filed 8/29/11, states he has filed for adoption of the minor in Family Court with a scheduled settlement hearing on 9/26/11 with a family law trial to follow if necessary, and he therefore requests the Court continue the hearing on Petitioner's Visitation Petition until the case to terminate parental rights is resolved (<u>NOTE: Family Law Case on Petition to Terminate Parental Rights is: 11CEFL03724</u>). Guardian further states that Petitioner rarely visited the minor over the past years, and when she did visit, the visits only lasted 30-60 minutes, rather than the court-ordered 4 hours; furthermore, Petitioner demonstrated no physical interaction or signs of affection towards the minor; Mr. Jones believes Petitioner's husband has encouraged her to increase the regularity of the visits because he (guardian) has filed for adoption of the minor. Finally, guardian attaches to his Objection a transcript of phone voice messages left on guardian's answering machine from a friend of Petitioner, who repeatedly threatens to harm the guardian if he does in fact call the Petitioner.</p> <ul style="list-style-type: none"> <u>Guardian Garrison Jones's Declaration dated 12/15/10 states</u> that Petitioner (mother) has showed up late to every court-ordered visit, at times 45 minutes to 1 hour, and only stays for 45 minutes to an hour on each visit with no excuse as to why she is leaving early; he further states he has tried to contact Petitioner but she is the one who is not responding to his calls regarding the visits. <u>Guardian Garrison Jones's Declaration filed 5/3/11 states</u> that Petitioner (mother) has not exercised her visitation since February 2011, and has skipped the last 7 visits, with guardian's calls to her going ignored; Mother's excuses range from "she forgot" or is not up to seeing the minor. Petitioner has never called Mr. Jones to cancel any of the visits. <p><u>SEE ATTACHED PAGE</u></p>	NEEDS/PROBLEMS/COMMENTS:
DOB:10/9/06			<p><u>NOTE:</u> As indicated below, current guardian's <i>Objection to Petition for Visitation</i>, filed 8/29/11, states he has filed for adoption of the minor in Family Court with a scheduled settlement hearing on 9/26/11 with trial to follow if necessary, and he therefore requests the Court continue the hearing on Petitioner's Visitation Petition until the case to terminate parental rights is resolved. (<u>NOTE: Family Law Case on Petition to Terminate Parental Rights is: 11CEFL03724</u>)</p> <p><u>Mother's previous Petition for Modification of Visitation was heard on 10/19/10. 10/19/10 Minute Order states:</u> The court finds it is not appropriate to change the visitation to unsupervised at this time. The court orders that parties shall continue to share the transportation costs. Parties may mutually agree to change the location of the visits. If there is not a mutual agreement, the visits shall remain at the current location of McDonalds at Clovis and Ashlan (current visitation time 10-2 p.m.)</p>
Cont. from			
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	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Updates:</p> <p>Contacts: copy of notes in file</p> <p>Recommendation:</p> <p>Reviewed by: NRN</p> <p>File 15 – Singer-Jones</p>	

Cont'd:

- **Guardian Garrison Jone's Declaration filed 6/27/11 states** that Petitioner's friend Dee has left threats on Guardian's message machine, and false accusations; however, the Guardian is most concerned that Petitioner is currently in contact with a Debra Huitron, who allegedly tried to kidnap the minor as an infant, by filing an illegal and unauthorized adoption in Kern County; Guardian believes Petitioner is in contact with Huitron (who has a lengthy criminal record) to have the minor kidnapped from him.

Declaration of Petitioner (Mother Heather Singer-Jones) in Support of Petition for Visitation, filed 7/25/11, attaches several statements from Petitioner detailing specific visits with the minor, as wells as letters from other in support of the *Petition*:

- **Petitioner's Statement dated 7/31/10** discusses guardian's behavior during the 7/31/10 visit, including guardian's request that Petitioner sign away her parental rights so he can adopt the minor, guardian's inappropriate "play" with the minor, and how guardian calls Petitioner degrading names in front of the minor.
- **Petitioner's Statement dated 12/19/10**, discusses how guardian made a sexual advance and remarks to Petitioner during her visit.
- **Petitioner's Statement dated 10/12/10** states guardian Mr. Jones kicker her out of his home in 2009 because Mr. Jones was having sexual relations with her, and because she met her current husband James Magee; Petitioner further states Mr. Jones has threatened to kill her husband. Petitioner continues that she has never been annoyed with the minor, nor has she ever said she wants the minor for the money, nor is she in anger management courses.
- **Petitioner's Statement dated 7/19/11** states Petitioner is opposed to Mr. Jones adopting the minor and that she would like to have unsupervised visits with the minor.
- **Undated Statement from Petitioner's husband, James Magee**, states that per the Clovis Police, Mr. Jones has not been at his residence for 2 weeks; furthermore, Mr. Jones does not call Petitioner back regarding visits, and that if Mr. Jones adopts the minor, Petitioner will never see the minor again. Mr. Magee also states that his wife (Petitioner) does not have brain damage, does not have a drinking problem, and never wanted to sell the minor. Mr. Magee would like to raise the minor as his own. He also states Mr. Jones has no contact with his own children.
- **Statement of Joretta Goad (Petitioner's sister-in-law),dated 9/23/10**, states she accompanied Petitioner on visits with the minor on 7/3/10, 8/14/10, and 8/28/10, and details how Petitioner was anxious prior to the visits because of the guardian's demeaning her in front of the minor; it further discusses how the guardian distracts the minor when the minor is interacting with Petitioner during the visits, and won't let Petitioner and the minor go on a walk together.

Atty Borjas, Tania
Atty Ramirez, Sonia

Petition for Visitation

Jose age: 8 years DOB: 3/21/03		<p>TANIA BORJAS, Guardian/paternal aunt, is petitioner.</p> <p>TANIA BORJAS, paternal aunt, was appointed Guardian on 1/13/10.</p> <p>Father: JOSE BORJAS – <i>served by mail on 8/17/11</i></p> <p>Mother: SONIA RAMIREZ – <i>personally served on 8/17/11</i></p> <p>Paternal grandfather: Alvaro Nino - <i>deceased</i></p> <p>Paternal grandmother: Carmen Borjas – <i>served on 8/17/11</i></p> <p>Maternal grandfather: Juan Ramirez - <i>deceased</i></p> <p>Maternal grandmother: Maria (aka Aracely) Ramirez – <i>served on 8/17/11</i></p> <p>Minute Order from 12/14/10 states the Court orders increased visitation for Sonia Ramirez, unsupervised every Saturday from 10 a.m. to 6 p.m. Tania Borjas is to deliver the minors to Sonia Ramirez; Ms. Ramirez is to return them to Ms. Borgas.</p> <p>Petitioner states she would like the visitation order to change so that the minors can spend more quality time with their mother, Sonia Ramirez. Petitioner would like for them to be able to spend overnight visits with their mother from Friday through Sunday. Petitioner states she may be moving to Hanford at the end of November and she would like mom to meet her half way or either pick up the minors for their visits or bring them back to the guardian.</p>	NEEDS/PROBLEMS/COMMENTS:	
Roy age: 7 years DOB: 8/11/04				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
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✓	Notice of Hrg			
✓	Aff.Mail			W/O
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	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Updates:
Contacts:
Recommendation:
Reviewed by: KT
File 16 - Borjas

DOD: 02/23/99			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Petition for Final Distribution granted 08/29/11.
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
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	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
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	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Updates:			
Contacts:			
Recommendation:			
Reviewed by: JF			
File 17 - Simpson			

DOD: 03/08/11		LURLEAN NORRIS , is Petitioner. 40 days since DOD. No other proceedings. I & A - \$45,000.00 Decedent died intestate Petitioner requests Court confirmation that decedent's 100% interest in real property located at 1109 Collins, Fresno passes to her pursuant to intestate succession.	NEEDS/PROBLEMS/COMMENTS: 1. The Petition is not marked at item 9a(1) re spouse of the decedent and at item 9a(3) re issue of a predeceased child. 2. Petitioner does not state her relationship to the decedent at item 14 of the Petition. 3. Petitioner is the only listed heir in item 14 of the Petition, however her relationship to the decedent is not stated. Item 9a(2) indicates that the decedent had a child and item 10(c) of the Petition is also marked stating that decedent is survived by other heirs. All heirs of the decedent and their relationship to the decedent should be listed in item 14 of the Petition. 4. Need Notice of Hearing with completed proof of service by mail to all persons who should be listed in item 14 of the Petition at least 15 days before the hearing. 5. A copy of a Grant Deed attached to the Petition states that the decedent was a widow; however, no deceased spouse is named in item 14 of the Petition. Pursuant to Local Rule 7.1.1D - If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Updates:	
Contacts: copy of notes in file	
Recommendation:	
Reviewed by: JF	
File 18 - Jones	

Petition for Appointment of Temporary Guardianship of the Person

Age: 10 years DOB: 10/14/00	<u>TEMPORARY EXPIRES 9/13/11</u>		NEEDS/PROBLEMS/COMMENTS:
	<u>GENERAL HEARING 10/31/11</u>		
	ALAN B. MALONEY , maternal step-grandfather, is petitioner.		<p>1. Petitioner requests the Court dispense with notice to the father, Phillip Replogle stating he has not been in contact with the minor since 2009 and his whereabouts are unknown. Declaration of due diligence filed on 8/31/11. If the Court does not dispense with notice the will need:</p> <p>a. Notice of Hearing.</p> <p>b. Proof of service of the Notice of Hearing along with a copy of the Petition, or consent and waiver of notice on the father, Phillip Replogle.</p>
Cont. from	Father: PHILLIP REPLOGLE – <i>declaration of due diligence filed on 8/31/11.</i>		
Aff.Sub.Wit.	Mother: AMANDA BARNES – <i>consent and waiver of notice filed on 8/31/11.</i>		
✓ Verified	Paternal grandfather: John Replogle – <i>deceased.</i>		
Inventory	Paternal grandmother: Diane Replogle		
PTC	Maternal grandfather: Randy Barnes		
Not.Cred.	Maternal grandmother: Michelle Barnes- <i>deceased.</i>		
Notice of Hrg	X	Petitioner states the biological parents are no longer together. Father is absent, whereabouts unknown. Mother is unable to care for the child due to unemployment and lack of permanent shelter. The minor has requested he not be returned to his mother or his father. Petitioner states a temporary guardianship is needed to prevent the parents from removing him from school.	
Aff.Mail			
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Sp.Ntc.			
Pers.Serv.			
✓ Conf. Screen			
Letters	X		
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report		Updates: Contacts: Recommendation: Reviewed by: KT File 19 - Replogle	
9202			
Order	X		
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

Atty Smith, Jane T., of County Counsel (for Petitioner Public Guardian)
 Atty LeVan, Nancy J., sole practitioner (Court-appointed for Conservatee)

Petition for Appointment of Temporary Conservatorship of the Estate (Pr. C. 2250)

Age: 69 years		PUBLIC GUARDIAN is Petitioner and requests appointment as Temporary Conservator of the ESTATE without bond. DIRECTOR OF MENTAL HEALTH was appointed general LPS Conservator of the Person on 3/3/2011. <u>Estimated value of the Estate:</u> Personal property - \$ 110.68* Annual income/VA benefits - \$16,800.00 Total \$16,910.68 *Another account of the proposed Conservatee has a negative balance of \$341.99 .	NEEDS/PROBLEMS/COMMENTS: <u>Note: Minute Order</u> dated 8/24/2011 from the hearing on the <i>Petition for Appointment of Probate Conservator</i> states Ms. Kruthers is appearing specially for Jane T. Smith. The Court notes for the record that a continuance is needed to give the Veteran's Administration notice. Ms. LeVan objects to the petition. Matter is set for Court Trial on <u>10/21/2011</u> with a two hour estimate. 1. Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator on: <ul style="list-style-type: none"> June Owings, proposed Conservatee. Note: Court Investigator Julie Negrete to provide <i>CI Report</i> and <i>Advisement of Rights</i>.
DOB: 9/7/1941			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/		
Aff.Pub.		1. Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator on: <ul style="list-style-type: none"> June Owings, proposed Conservatee. Note: Court Investigator Julie Negrete to provide <i>CI Report</i> and <i>Advisement of Rights</i>.	
Sp.Ntc.			
Pers.Serv.	X		
Conf. Screen			
Aff. Posting			
Duties/Supp			
Objections			
Video Receipt			
CI Report	X		
9202			
✓ Order		Reviewed by: LEG Reviewed: 9/7/11 Updates: Recommendation: File 20 - Owings	
✓ Letters			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			